USER TESTING FOR CRS MONTHLY DONATION FORM

Despite the acceptance of key best practices for interaction design, Krug (2005) says, "all Web users are unique, and all Web use is basically idiosyncratic. The more you watch users carefully and listen to them articulate their intentions, motivations, and thought processes, the more you realize that their individual reactions to Web pages are based on so many variables that attempts to describe users in terms of one-dimensional likes and dislikes are futile and counter-productive" (pp. 128). In reality, users don't always choose the best options; they choose the first reasonable option (Krug, 2005, pp. 24). Effective designs require testing and revision over time to figure out the best solution to the desired tasks and goals of a web property.

The following experiments aim to determine if and how CRS can improve its online monthly donations by adjusting the content on the landing page for the donation form. As a baseline, the bounce rate for the monthly donation for 2011 was 68% according to Google Analytics. The page had approximately a 27% conversion rate with an average gift of about $43.70. This baseline was determined by comparing page view data from Google Analytics to acquisition data from CRS's donation collection database using the following formula and rounding to the nearest whole number:

(Total Conversions/Total Page Views) x 100 = Conversion Rate

1. Usability Testing

For this experiment, ten individual user testing sessions were conducted. During these sessions, participants were recorded as they attempted to make a monthly donation on the CRS website. At the end of the donation process, each participant was asked to complete a 4 question follow-up survey. After the survey, a facilitator conducted a short interview about their answers and overall user experience (See APPENDIX A for that facilitator script for this testing).

1.1 Study Objective

The objective of this experiment was to determine areas in which CRS' current monthly donation process could be improved through the observation of user interactions.

1.2 Participant Sample

Ten participants (5 male, 5 female) were recruited through internal CRS networks. A participant screener was sent to each applicant to determine his or her eligibility (For a sample of the screener, see APPENDIX B). The screener collected information on the applicant's religious affiliation, affinity to give to charity and familiarity with CRS. For this experiment, the test sample needed to meet the following requirements.

Participants needed to:

1. Be experienced in making online purchases.
2. Have demonstrated an affinity for charitable giving.
3. Have never made a monthly donation to CRS.
4. Half of the participants also needed to be of Catholic religious affiliation.

The selected sample group ranged between the ages of 27 and 63. Five of the participants were currently practicing Catholics, one was a former-Catholic and four elected not to disclose their religion. From the screeners, it was determined that all of the selected participants had used the Internet to make online purchases in the past; six of the participants claimed to make online purchases once a month or more. All of the participants also claimed to give money to charity at least once a year. However, nine out of ten of the participants had never made a donation to CRS before. One participant had made a one-time donation to CRS in a past, but before this test, none of

the participants had ever made a monthly donation to CRS (For a full list of participant data, see APPENDIX C).

Sampling Error and Confidence Interval

This qualitative research uses a sample of the population. Since the sample size for this test is small, the adjusted Wald method was used to create a confidence interval for quantifying results. Research has shown that the adjusted-Wald is more accurate for small sample sizes than the Wald method (Sauro & Lewis, 2012). The adjusted-Wald method requires adding two successes and two failures to the observation numbers. It then uses the Wald-formula to compute a 95% confidence interval. It should be noted that even with a 95% confidence interval, errors could still occur if the sample selected differs from the total population of the target audience.

1.3 Procedure

The usability sessions were conducted in-person at the Usability Lab at the University of Baltimore in Baltimore, MD. A usability test was set up on a computer using Tobii eye-tracking software, which recorded video and audio of each participant. The software also tracked and recorded the movements of the participants' eyes on screen as they navigated through the test.

At the start of each test, a facilitator calibrated the participant's eyes to the software. Each participant was then give a VISA gift card with which to make a monthly donation on the CRS website and then the facilitator then left the room. The tests were conducted with the participant alone in the testing room while the facilitator observed through one-way glass in another room. The participant and facilitator were able to talk to each other though microphones, but the participant could not see the facilitator. This method was used to ensure that the actions of the facilitator, such as taking notes, did not affect the actions of the participants. During the testing

sessions, participants were also asked to describe their actions out loud and to discuss any questions or problems they encountered.

1.4 Materials

The participants interacted with live, current pages on the CRS website. The pages that were viewed were the donation landing page from the main CRS website (crs.org), the Footsteps in Faith monthly donation form, the monthly donation form Thank You form and, in some cases, the main CRS homepage.

There was one main task and two sub-tasks in this usability test. (For a copy of the task list that was given to participants, see APPENDIX D.) The main task directed participants to use their VISA gift card to make a monthly donation to CRS' Footsteps in Faith program using the donation form on the website. The participants started the test on the donation landing page of the CRS website (http://www.crs.org/donate/). They were then directed to find the monthly giving donation form from that page. Once the participants reached the monthly donation form Thank You page, marking the end of the main task, they were then given two more sub-tasks to complete:

1. Save the donation information for their records.
2. Return to the CRS homepage.

Upon completion of these tasks, the participant was asked to complete a multiple-choice survey that addressed the level of difficulty of the donation process, the adequacy of the information provided on the donation form, the participant's aesthetic opinion of the donation form, and the participants' propensity to make a donation to CRS in the future based on their experience.

Once the participant completed the survey, the facilitator returned to the room for a brief interview with the participant. The interviews focused mainly on the participant's survey responses and addressed any problems or questions that the participant had experienced during the testing experience.

1.5 Results

Completion Rate Measurement

Collected data was analyzed by pre-determined measures of task completion. Two things measured the total success rate of the main task:

1. Monetary donation completion – This was measured by the acceptance of the donation charge on the credit card and information successful gathered by the CRS donation database.
2. Donation form completion - This was measured by the user reaching the last page of the donation form which in this case was a Thank You page.

The success rate of the sub-tasks were determined by the participants ability to successfully 1) save the donation information for their personal records and 2) return to CRS' website homepage from the Thank You page.

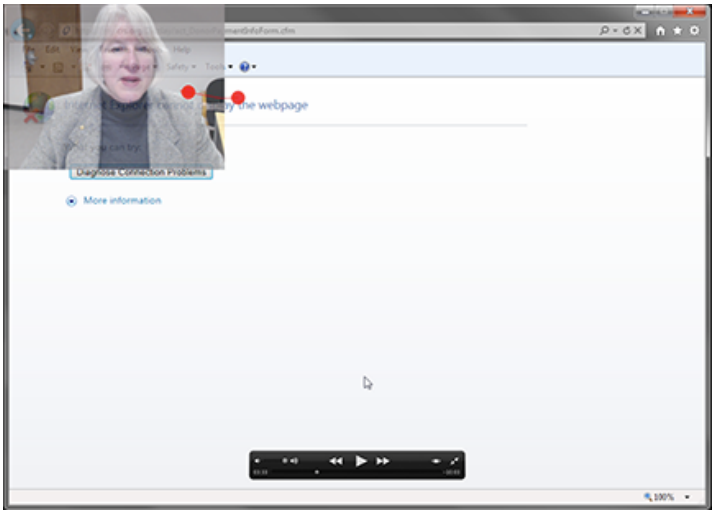
Main Task Success Rate

The monetary donation completion was successful for nine of the tests. The one failure resulted from an unknown error that caused the donation form to reload upon clicking the submit button. In this case, the donation was not accepted and the user was not able to complete the task. The reason for this error was not determined, but was most likely a form validation error that did not

allow the form to be submitted.

Despite the success of the monetary donation, only three of the tests rendered the donation form Thank You page successfully. Six of the tests gave the user a webpage load error instead of the Thank You page.

Image 1. Thank You page error



This error left the user confused as the whether or not the transaction was successful. When asked what she would do in this situation, one user stated that she would check her credit card online to see if the transaction went through. If it hadn't she said she wouldn't try to make the donation again because she would be afraid the same error would happen.

After internal evaluation, it was determined that this error was most likely caused by the testing environment which forced multiple donations from the same IP addresses in a short period of time on the form. Because this error was caused by a technical bug and not a design flaw, it should not be used to influence usability findings for the form. Therefore, for the purpose of this research, the

monetary donation success rate will be considered more accurate than the donation form completion rate. Using the adjusted-Ward formula, this research is 95% confident that about 86% of users would complete the monetary donation task successfully.

Sub-task Success Rate

Because only three participants successfully reached the Thank You page, only 30% of the sample was even able to attempt the sub-tasks. The results in the sections are gathered from the group who were able to attempt the sub-tasks, not the full sample.

Sub-task one asked the user to save the donation information for their records. All three users encountered problems with this task. The donation form Thank You page did not provide any information about the specific donation that the donor just made. Nor did it provide any indication that a receipt would be e-mailed to the user. All three users failed this task and did not save any information about the reoccurring credit card charge.

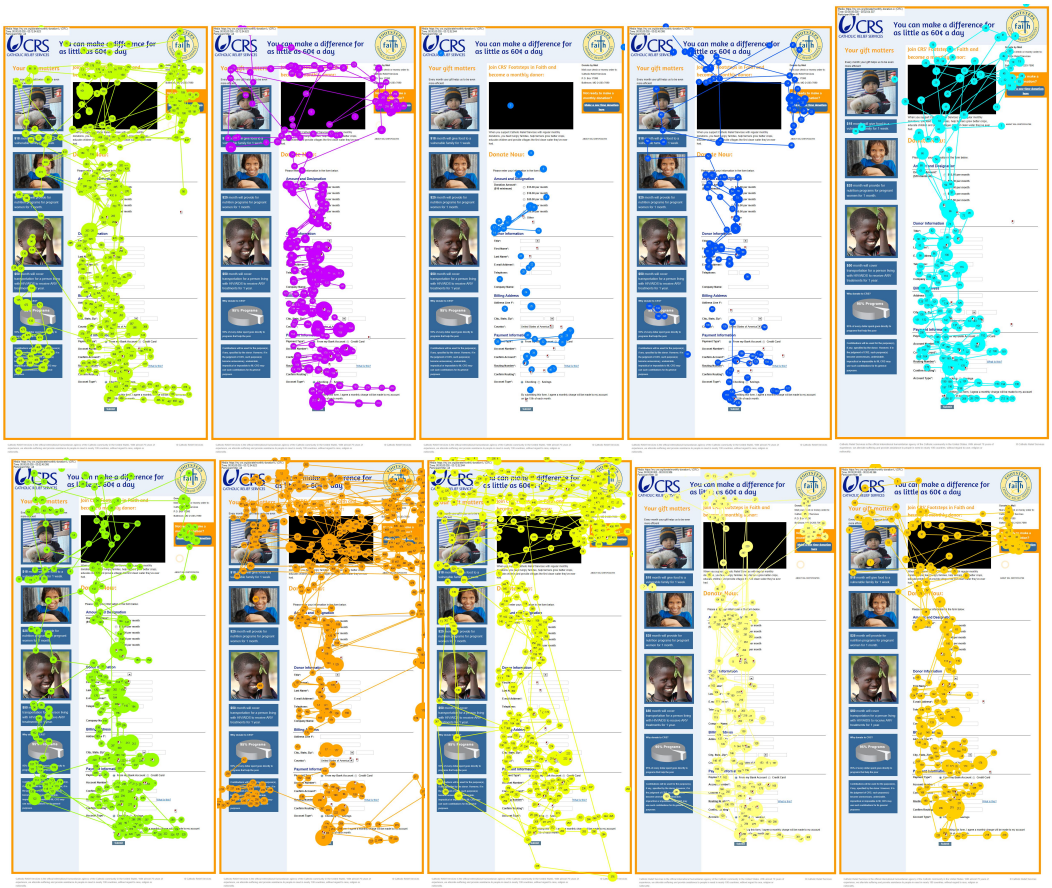
Image 2. Thank You page

Sub-task two asked the user to return to the CRS homepage. Of the three users who reached the Thank You page, two of them successfully returned to the CRS website homepage. One user ultimately typed “crs.org” in the browser’s URL bar. One user deleted the sub-subdirectories from the URL, was then taken to my.crs.org and from there clicked the CRS logo to go to the CRS homepage. One user gave up without returning to the homepage.

Eye-tracking Data

Data from the eye-tracking software is shown below. The ten participants eye-tracking charts were overlaid on top of each other to reveal the most viewed parts of the donation page. (For a larger view of this image and individual eye-tracking data for each participant, see APPENDICES E-N.)

Images 3-12. Eye-Tracking Data



The top portion of the page - e.g. what appeared above the fold of a web browser - had high visibility. The form fields themselves also had high visibility. However, the information on the left hand side of the form fields had low visibility, except for the bottom box, which many participants read while waiting for their donation to be submitted.

Post-test Survey Answers and Interview

All participants were asked to take a post-test survey. The survey consisted of four multiple-choice questions.

Post-test Survey

1. Making a making a monthly donation was:
    a. Easy
    b. Medium
    c. Hard
2. The donation form provided enough information to convince me to make a donation:
    a. Yes
    b. No
    c. I don't know
3. Overall, the look and feel of the donation page was:
    a. Perfect
    b. Above Average
    c. Average
    d. Below Average
    e. Unacceptable
4. Based on my experience, I would consider making a donation to CRS in the future:
    a. Yes
    b. No

Despite the low full completion rate, 80% of the respondents ranked the donation process as easy and 20% ranked it as medium. When asked if the form provided enough information, 60% of the participants responded yes and 40% said they didn't know. All of the participants rated the look and feel of the donation form as average or above average/perfect. Seventy percent of the participants said that they would donate to CRS in the future based on their testing experience.

The full array of answers is show in the chart below:

Table 4. User Testing Survey Answers

	Level of Difficulty	Enough Information	Look and Feel	Future Donation
A	Medium	Yes	Average	No
B	Medium	I Don't Know	Average	No
C	Easy	Yes	Above Average	Yes
D	Easy	I Don't Know	Above Average	Yes
E	Easy	Yes	Above Average	Yes
F	Easy	I Don't Know	Above Average	Yes
G	Easy	I Don't Know	Average	No
H	Easy	Yes	Perfect	Yes
I	Easy	Yes	Average	Yes
J	Easy	Yes	Average	Yes

In general, in-person interviewees tend to skew positive with their responses out of politeness.

1.6 Discussions and Implications

Technical Main Task Errors

There were two errors that prevented the participants from achieving full completion of the main task. Both of these errors are usability issues that cannot be fixed by design improvements, but must be fixed from a technical standpoint.

1. Thank You page error - the Thank You page did not load.
2. Submit button error - the "submit" button reloaded the donation form and did not accept the donation.

From a usability standpoint, the Thank You page error needs to be examined and addressed by the donation platform provider and should be fixed to ensure that donations are not lost because of technical errors.

For the submit button error, the form code needs to be examined for errors in validation. When this error occurred, the user assumed that he had filled out something wrong, but could not figure out what because no error message appeared. Confused, he stated, "Did that go through? I can't find if there's an icon that I'm missing or like if it doesn't like the information I put in. Does it not like me doing the $10 other? That's weird." Wroblewski (2008) states that" top-level error messages should indicate an error has occurred and how it can be resolved. If multiple errors exist, they should be listed in the top level message" (pp. 137). Otherwise, a user cannot easily determine what is the cause of the error and cannot easily fix it. Further examination of form entries and validation coding needs to be conducted to find the cause of this error.

Reduce Information on Donation Page

One of the main comments that came out of the usability testing sessions was that participants believed there was too much non-critical information on the donation form. This included the video and the information on the sidebar. Forty percent of participants didn't read any information on the sidebar and 100% of participants did not watch the video.

When asked why they did not look at certain informational items on the donation form, participants gave some of the following responses.

> *"By the time somebody gets to a donation page, they're comfortable with their decision to make a donation, so you don't have to convince them to make a donation if they're already here. I mean, not to the extent that they have."*

> *"I guess, you know, honestly, before I'm at the point of actually going in and entering stuff, I pretty much have a good feel of whether I'm going to be donating or not."*

> *"A monthly donation is something you plan ahead of time, so this other stuff, I mean, I didn't even click on it because I was like, alright, it's a monthly donation, so I know what I'm doing. You already have that in your head. You know what you're investing in. I think it would be a rarity to make a monthly investment off of something you read off of a website. I think that's something you sit down and think about."*

In general, many participants felt that they needed to be convinced to make a donation before they got to the donation form and by the time they were at the form they were ready to give, so they didn't need to look at elements like a video. This corresponds with current research that has found that "once users have clicked to fill in a form, they don't want fluff. They don't want sales pitches. They've passed that point and are now focused on completing the form." (Jarrett & Gaffney, 2009, pp. 78).

Reduce load time of page

Five of the participants made comments about how much time it took the page to load. According to Google Analytics, the page took 3.6 seconds to load on average. Research has shown that users prefer a page-load time of less than one second (Nielsen, 2000). After about one second of waiting, a user's thought process becomes interrupted. After ten seconds, a user loses interest. In a real life situation, the long load time of the donation form could deter potential donors from completing their donation.

Minor usability issues

Some user had problems answering optional fields, specifically fields like "Company Name." This could be eliminated by easily defining optional fields.

Three participants had a hard time figuring out if they had gone to the correct page to make a monthly donation, rather than a one-time donation. Indicating the fact that the donation is monthly in the headline could avoid this confusion.

Sub-Task Usability Problems

First, the donation form Thank You page did not indicate next steps or provide the donor with their donation information which is valuable from a record keeping position both financially and legally for a donor's taxable-deductions. One participant stated,

> *"The one thing it didn't let me do was print a receipt. A receipt did not come up. Or a reference number. Something to track. That's what I would write down. I would say, 'Something's been e-mailed you to track it." And then I wouldn't have to save anything because normally when you make donations, they send something to you to Thank You for that. I didn't get that."*

In actuality, a receipt is e-mailed to each donor. Therefore, to improve this problem, the language on the Thank You page should be changed to indicate that fact.

Second, there was no easily navigable way for the user to return to the CRS website. The Thank You page only included links to Facebook and Twitter, which one participant commented on, saying, "I don't like Facebook and Twitter." Clicking on the CRS and the Footsteps in Faith logos to try to locate this the main websites was a common practice implemented by participants. Therefore, the Thank You page and improve this problem my adding links to the main website

from the logos.

1.7 Recommendations and Hypothesis

Based on the results of the user testing and current research findings, the following changes were proposed to improve the user experience of the donation form to improve conversions in the form of online donations:

1. **The photo imagery was moved to the header of the donation form.**

   The photo imagery was moved so that it was in the sight area of the page with the most visibility. The 'above-the-fold' real estate area should house the most important content (Nielsen, 2000) and as stated earlier, photographs can increase the perceived credibility of a charity and a cause.

2. **The headline was changed to "Help feed the Hungry and combat poverty" and the subhead was changed to "Become a Monthly Donor."**

   Jarrett & Gaffney (2009) state, form instructions should provide "a good title that says what the form is for" (pp. 70). Also, adding monthly to the sub-headline could reduce confusion as to what type of donation the form is for.

3. **The pie chart was moved 'above the fold' and was redesigned and other "trust" symbols – BBB accreditation and Charity Navigator rating logos - were moved above the pie chart.**

   This aims to increase the credibility and trustworthiness of CRS and Footsteps in Faith.

4. **The size of the body copy was increased from 12pts to 16pts and the body copy format was changed to bullet points.**

   Reading from a computer screen is about 25% slower than reading from paper (Nielsen, 2000) and on-screen copy should be short and use plain language because most users scan copy on computer screens instead of reading thoroughly (Krug, 2005). Increasing the size of the copy and adding bullets makes it more scannable.

5. **The one-time donation button was removed and replaced with a line of text.**

   The purpose of this was to decrease the prominence of the one-time donation link, in order to keep donors on the monthly form.

6. **The sidebar was removed.**

   Eye-tracking research has shown that users focus narrowly on the labels and fields and barely look at the rest of the form (Jarrett & Gaffney, 2009, pp. 125). All important information from the sidebar was moved to the top if the form.

7. **The descriptions of the gift amounts were changed to be more descriptive.**

   The descriptions of gift amounts were changed to describe what each donation would buy for a beneficiary. This serves to increase the donor's motivations of psychology of benefits and altruism.

8. **The "Company Name" field was removed.**

   This field was unnecessary and caused confusion during testing.

Below is a wireframe of the form incorporating the above improvements. For a larger image, see APPENDIX O.

Image 13. Wireframe of the improved donation form